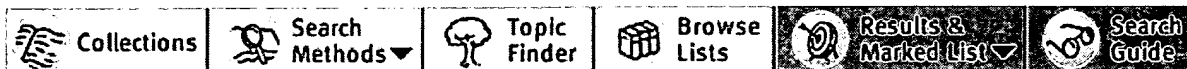


L Number	Hits	Search Text	DB	Time stamp
1 scanned titles & abstracts	2	(character or personality) with analysis with (planning or planner or schedul\$4)	USPAT	2003/02/24 16:13
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3	20	(personality) with (planning or planner or schedul\$4)	USPAT	2003/02/24 16:13
4	11	5961332.URPN.	USPAT	2003/02/24 16:15
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-	6588	event with plan\$4	USPAT; EPO; JPO; IBM_TDB	2002/09/05 09:42
-	155	(event or activit\$) with (schedul\$ or coordinat\$4 or match\$4) with profil\$4	USPAT; EPO; JPO; IBM_TDB	2002/08/22 14:45
-	209	(event or activit\$) with (schedul\$) with plan\$4	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:10
-	37	"event planning"	USPAT; EPO; JPO; IBM_TDB	2002/08/22 14:45
-	0	(event or activit\$) with (schedul\$) with plan\$4 with (questionnai\$3 or surve\$3)	USPAT; EPO; JPO; IBM_TDB	2002/08/22 14:55
-	21	(event or activit\$) with (schedul\$) with plan\$4 and (questionnai\$4 or surve\$3)	USPAT; EPO; JPO; IBM_TDB	2002/08/22 15:38
-	159	(schedul\$) with plan\$4 and (questionnai\$4 or surve\$3)	USPAT; EPO; JPO; IBM_TDB	2002/08/22 15:44
-	0	(questionnai\$4 or surve\$3) with event with (plan\$4 or mak\$4 or creat\$4 or determin\$4 or decid\$4) with schedul\$3	USPAT; EPO; JPO; IBM_TDB	2002/08/22 16:16
-	17	(questionnai\$4 or surve\$3) with (plan\$4 or mak\$4 or creat\$4 or determin\$4 or decid\$4) with schedul\$3	USPAT; EPO; JPO; IBM_TDB	2002/08/22 16:19
-	2	(questionnai\$4 or surve\$3) with (event\$4 or activit\$3 or part\$3) with (plan\$4 or mak\$4 or creat\$4 or determin\$4 or decid\$4) with schedul\$3	USPAT; EPO; JPO; IBM_TDB	2002/08/22 16:19
-	36	wedding with (plan\$5 or schedul\$6)	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:13
-	27	Tsuchiya.in. with Eiji	USPAT; EPO; JPO; IBM_TDB	2002/09/05 17:31
-	1	Hiroyuki.in. with Machiya	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:16
-	100	Honda.in. with Masanori	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:16
-	19	Kameda.in. with Shigeru	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:16
-	0	Rorei.in. with Koh	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:15
-	4	plan\$6 with (questionnaire\$2 or survey\$2) with schedul\$5	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:19
-	8	plan\$6 with (questionnaire\$2 or surve\$4) with schedul\$5	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:22
-	26	questionnaire\$2 with schedul\$5	USPAT; EPO; JPO; IBM_TDB	2002/08/27 17:23

-	q	101	(survey\$3 or questionnaire\$3) with (planner\$2 or schedule\$3)	USPAT; EPO; JPO; IBM_TDB	2002/09/05 09:43
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-	u	146	(calendar\$4 or schedul\$4 or plan\$4) with (pay\$2 or payment\$5 or purchas\$5) with (event\$4 or wedding or birthday\$4 or holiday\$4 or activit\$4)	USPAT; EPO; JPO; IBM_TDB	2002/09/05 18:17
-		1427	wedding	USPAT; EPO; JPO; IBM_TDB	2002/09/05 18:18
-		650	wedding and (plan\$6 or schedul\$6 or orgainiz\$4)	USPAT; EPO; JPO; IBM_TDB	2002/09/05 18:18
-	v	86	wedding.ti.	USPAT; EPO; JPO; IBM_TDB	2002/09/05 18:19
-	u	36	(questionnaire\$2 or survey\$2) with characteristic\$4 with (user\$2 or person\$4 or respondent\$2 or respondant\$2 or surveyee)	USPAT	2003/01/27 16:30
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-	"	12	(questionnaire\$2 or survey\$2) with (attribute\$4 or characteristic\$4) with (plan\$4 or schedul\$9)	USPAT	2003/01/27 16:36
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-	"	6	(questionnaire\$2 or survey\$2) with (plan\$4 or schedul\$9) and personality	USPAT	2003/01/27 16:36
-	"	62	personal with planner	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:17
-	u	80	goal\$2 with planner	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:19
-	b	11	life\$6 with planner	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:27
-	"	49	financial with planner	USPAT; EPO; JPO; IBM_TDB	2003/01/28 14:13
-		675	financial with (plan\$6 or goals)	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:29
-	v	2	6430542.pn. or 6064984.pn.	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:33
-	u	2	"life events" with plan\$5	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:33
-	u	12	life with events with plan\$5	USPAT; EPO; JPO; IBM_TDB	2003/01/28 12:34

-	"	39	life with event\$4 with plan\$5	USPAT; EPO; JPO; IBM_TDB	2003/01/28 13:43
-		13918	character with rat\$4	USPAT; EPO; JPO; IBM_TDB	2003/01/28 13:43
-	"	44	character with (rate or rates or rated or rating or ratings) with (plan\$4 or schedul\$5)	USPAT; EPO; JPO; IBM_TDB	2003/01/28 13:48
-	"	146	match\$4 with (date or dating) with plan\$4	USPAT; EPO; JPO; IBM_TDB	2003/01/28 13:50
-	"	16	match\$4 with (date or dating) with plan\$4 and (characteristic\$2 or attribute\$2 or personalit\$4)	USPAT; EPO; JPO; IBM_TDB	2003/01/28 13:51
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-	"	25	5086394.URPN.	USPAT	2003/01/28 13:56
-		232	"neural network" with plan\$4	USPAT	2003/02/24 11:00
-	"	3	"neural network" with plan\$4 with (event\$2 or activit\$4 or party or parties or wedding of birthday\$4)	USPAT	2003/02/24 11:01
-		296	"neural network" with (event\$2 or activit\$4 or party or parties or wedding of birthday\$4)	USPAT	2003/02/24 11:20
-	"	5	"neural network" with (party or parties or wedding of birthday\$4)	USPAT	2003/02/24 11:21
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-	"	16	"neural network" with planning	USPAT	2003/02/24 16:12


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<u>12</u>	planning events based on character analysis	<a href="#">View 2 results</a>	<a href="#">Add to Search</a>	<i>scanned titles + abstracts</i>
<u>11</u>	planning events based on personality analysis	<a href="#">View 2 results</a>	<a href="#">Add to Search</a>	"
<u>10</u>	schedule based on personality analysis	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>9</u>	schedule based on character analysis	<a href="#">View 22 results</a>	<a href="#">Add to Search</a>	"
<u>8</u>	schedule based on character profile	<a href="#">View 17 results</a>	<a href="#">Add to Search</a>	"
<u>7</u>	personality analysis scheduler	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>6</u>	character analysis scheduler	<a href="#">View 1 results</a>	<a href="#">Add to Search</a>	"
<u>5</u>	character analysis planner	<a href="#">View 17 results</a>	<a href="#">Add to Search</a>	"
<u>4</u>	character analysis planning	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>3</u>	character analysis scheduling	<a href="#">View 7 results</a>	<a href="#">Add to Search</a>	"
<u>2</u>	character analysis and planning or scheduling	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>1</u>	character analysis and planning or scheduling	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	

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### Number Search

<u>25</u>	personality based party organizer	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	<i>scanned titles + abstracts</i>
<u>24</u>	personality based wedding organizer	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>23</u>	personality based party organizer	<a href="#">View 29 results</a>	<a href="#">Add to Search</a>	"
<u>22</u>	personality based organizer	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>21</u>	neural network planner	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>20</u>	neural network event planner	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>19</u>	neural network wedding planner	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>18</u>	neural network wedding planning software	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>17</u>	neural network wedding planning software	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>16</u>	neural network planning software	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>15</u>	birthday party planning software	<a href="#">View 1 results</a>	<a href="#">Add to Search</a>	"
<u>14</u>	bithday party planning software	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>13</u>	party planning software	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>12</u>	party planning software with user's personality	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	.
<u>11</u>	likes and dislikes of user's incorporated in software	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	
<u>10</u>	software packages user's personality	<a href="#">View 7 results</a>	<a href="#">Add to Search</a>	"
<u>9</u>	software packages using user's personality	<a href="#">View 2 results</a>	<a href="#">Add to Search</a>	"
<u>8</u>	using personality to plan an event	<a href="#">View 7 results</a>	<a href="#">Add to Search</a>	"
<u>7</u>	personality based party planner	<a href="#">View 20 results</a>	<a href="#">Add to Search</a>	"
<u>6</u>	personality based planner	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>5</u>	personality based event planner	<a href="#">View 18 results</a>	<a href="#">Add to Search</a>	"
<u>4</u>	personality planner	<a href="#">View 1 results</a>	<a href="#">Add to Search</a>	"
<u>3</u>	personality based software	<a href="#">View 11 results</a>	<a href="#">Add to Search</a>	"
<u>2</u>	personality based planner	<a href="#">View 31 results</a>	<a href="#">Add to Search</a>	"
<u>1</u>	personality based planner	<a href="#">View 0 results</a>	<a href="#">Add to Search</a>	"

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Set	Items	Description
S1	0	(AUTOMAT???) (2N) (EVENT?? OR PARTY??? OR PARTIES??? OR ACTIVIT???) (5N) (PERSONALIT???) (2N) (PLAN?)
S2	4920	(EVENT??? OR PARTIES?? OR PARTY??? OR ACTIVIT???) (3N) (PERSONALIT???)
S3	0	S3 (5N) PLANNING
S4	3	S2 (5N) PLANNING
S5	3	RD (unique items)
S6	918	(EVENT?? OR ACTIVIT??? OR PARTY OR PARTIES??) AND (PERSONALIT???) (2N) (PLANNER?? OR ORGANIZER?? OR HOSTESS?? OR HOST??)
S7	35	S6 AND AUTOMAT???
S8	20	RD (unique items)

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**Web-based PIMS can help you stick to your schedule**

Brookshaw, Chip

InfoWorld v21n19 PP: 57-58+ May 10, 1999 ISSN: 0199-6649 JRNL CODE: IFW

DOC TYPE: Journal article LANGUAGE: English LENGTH: 3 Pages

WORD COUNT: 2524

**ABSTRACT:** More than 20 Web-based personal information managers were reviewed, judging the usability and performance of their calendars, address books, and to-do lists. Six are recommended: AnyDay.com Inc.'s AnyDay.com, Appoint.Net Inc.'s Appoint.Net, Visto Corp.'s Visto Briefcase, Jump Networks Inc.'s Jump, America Online's When.com, and Yahoo Inc.'s Yahoo Calendar. The 2 top picks overall were Visto Briefcase and Yahoo Calendar.

**TEXT:** IF YOU MISS a meeting these days, you'd better have a good excuse. From bulging planners to sleek handhelds, there are takeit-with-you organizers to suit every taste. For those who don't worship at the church of Franklin Covey or aren't high enough on the executive food chain to rate a Palm V, a number of mature desktop programs, such as Symantec Act and Microsoft Outlook, can also help you keep your life's details straight. The pack of Web-based personal information managers (PIMs) that have recently sprung up are the latest way to arrange your affairs, but they come with a twist. Instead of stand-alone software loaded on your desktop, these organizers are stored at a service provider and accessed via a browser. It's an example of the network computing architecture many say will supercede desktop PCs increasingly burdened with flaky operating systems and bloated applications. (See our 1998 Product of the Year awards issue, "Technology most likely to change the way you do business," [www.info-world.com/printlinks/](http://www.info-world.com/printlinks/).)

The benefits of a networked calendar, address book, to-do list, and so on are discrete but clear. These Web-based tools aren't sophisticated enough to replace their PC counterparts, but they are adequate for those who don't have a desktop PIM, such as Outlook. For those who do, online organizers can complement such products by synchronizing data with them. This means you will have access to your calendar at any browser-enabled workstation connected to the Internet be it at a colleague's desk, an airport kiosk, or an exhibit floor.

Travelers and mobile workers who keep their schedules on laptops or handheld PIMs won't get much out of these online organizers because notebooks and handhelds synchronize effectively with desktop PIM software. But when they're shared among a workgroup or team, Web-based calendars can benefit even the most wired. The result is basic groupware without the overhead and complexity of a product such as Lotus Notes.

**A crowded field**

Simply put, online calendaring has exploded since the beginning of this year. Because it's a relatively simple application to code in HTML, CGI, and other Web languages, dozens of companies large and small have put together free calendar sites (often providing address book and to-do functions as well), hoping to sell ads against the page views. Some, such as Yahoo, are leaders on the Web. Others are being snapped up by titans such as America Online and Microsoft. Many of the rest won't survive.

I tested more than 20 Web-based PIMS, judging the usability and performance of their calendars, address books, and to-do lists. Although some of these organizers come with other Web-based services, such as file storage, personal site hosting, and free e-mail, I focused on PIM-related features, with an emphasis on calendaring.

If you're looking for an online organizer to recommend to your users, six of the bunch made my cut: AnyDay.com, Appoint.Net, Visto Briefcase, Jump (whose acquisition by Microsoft is pending), AOL's When.com, and Yahoo Calendar. AnyDay.com and Jump, still in beta, await a few features but are fully functional. Although any online calendar can act as a shared calendar

(simply by sharing a single log-in and password), only Visto Briefcase, When.com, and Yahoo Calendar were designed with group calendaring in mind.

My top two picks overall were Visto Briefcase and Yahoo Calendar, but they are likely to please different types of users. Visto Briefcase is slicker and offers a few extra features, but its pretty interface is too graphics-intensive for a dial-up connection or an older computer. Yahoo, on the other hand, is known for its lean, quick-loading site, and its calendar maintains this reputation. It follows that Yahoo Calendar doesn't have the sparkle or extra touches of Visto Briefcase, although it isn't ugly or poorly designed. Regardless, because choosing a PIM is a matter of personal preference, I recommend checking out all six before making your decision.

Although the quirks and **personalities** of these **organizers** may ultimately influence your decision, broad considerations apply to all of them. Usability, which includes performance, is the most important. This includes everything from the presence or absence of a search feature to how well a calendar handles recurring **events**. A Web-based PIM's visual design is also part of its usability, but this isn't simply a matter of aesthetics. Calendars, address books, and to-do lists are used in brief bursts; poor or nonstandard design makes them harder to scan quickly.

For many users, the single most important feature is synchronization capability. Of the six Webbased PIMs I liked, only three offer true synchronization, while a fourth instead offers a rudimentary import feature. Also, for those who need them, three of these PIMs offer public or shared calendars. Rather than dwelling on every detail of each of these products, I'll highlight below each PIM's most important features, the tasks it handles well, and the areas in which it falls short. For all the particulars, see the features chart "Six Webbased PIMs that are worth a look," below.

Something for everyone

Online organizers typically use a three-paneled format similar to that found in Notes or Outlook. A large pane displays the current view; a narrower pane on the screen's left edge offers navigational elements, such as a toolbar or current-month view; and a pane across the top of the screen shows a toolbar and, in most cases, a banner ad (that's why these tools are free). I think HTML frames are a natural choice for this multipaned format; employing HTML frames will prevent the entire page from reloading every time you jump to a new day or view. However, only Visto Briefcase and AnyDay.com use these frames effectively.

(Illustration Omitted)

Captioned as: VISTO BRIEFCASE is the most full featured Web-based PIM, but it overuses icons.

(Table Omitted)

Captioned as: Features

(Table Omitted)

Captioned as: A plague of planners

Except for When.com, all of the top online PIMs offer calendaring, an address book, and a to-do list. When.com does not include an address book or a to-do list, but its strong shared calendaring features and its recent acquisition by AOL got it into the final cut. I expect AOL will add an address book and to-do list (these features are relatively simple compared with calendaring) by the time the company rolls out When.com this summer across its family of brands, including its ICQ instant-messaging system and CompuServe. (Netscape's Netcenter already offers a When.com calendar.)

All of these online calendars offer the standard features you would expect: day, week, and month views; a go-to-day link; and buttons for adding new

appointments.

(Amazingly, many of the also-rans omit some of these basics. See "A Plague of Planners" chart, above, for a list of Web-based PIMs to avoid.) Although each Web-based PIM offers a preferences page, don't expect to find the degree of customization typically available in a desktop PIM. Although you can adjust settings such as the portion of a day to be displayed, the overall organization and style of an online PIM is usually fixed.

As I mentioned earlier, the look of an online PIM plays a large role in its degree of usability. Thanks to good HTML authoring, the displays of all of these organizers adjust intelligently to accommodate different screen resolutions and browser windows of various sizes - expanding or contracting a month view, for instance, to fit the available space. The ornateness of their designs, however, runs the gamut from Yahoo Calendar's barebones list views to Jump's cutesy representation of a ring-bound day planner. I found the look of AnyDay.com a good compromise colorful without being studded with bandwidth-filling icons. An excellent product otherwise, Visto Briefcase was particularly guilty of using an icon when a simple text link would do (see screen, left).

Design is not the only element that affects an online PIM's performance, however. The provider's site must be capable of handling its traffic, with cycles and bandwidth to spare. As mentioned, Yahoo has always had a highly responsive site, and this is a big reason that Yahoo Calendar was one of my favorites. No one will use an online organizer (or any networked application, for that matter) if they unnecessarily have to wait for pages to load. And don't forget about your workstation's role in performance. Although online PIMs employ basic Web technology, their nested, multicell HTML tables can overwhelm older processors.

Often, the difference between a top-notch product and a good but unexceptional one comes down to attention to detail. In this area, Visto Briefcase was the strongest. For instance, it can format a calendar page for proper printing, delete one **event** in a recurring series, and reject invalid dates. If it had a search feature, Visto Briefcase would be the pick of the group.

Sync it to me

Maintaining multiple PIMs of any type is a chore - and risky to boot. Synchronization is so critical to users that only those online organizers that offer it can be considered full-featured. Of the six I tested in detail, only three - Yahoo Calendar, Visto Briefcase, and Jump - could merge their records with those of a desktop PIM, including the calendar, address book, and task or to-do list. AnyDay.com offers the capability to import a delimited text file, and, according to company officials, synchronization capability is coming soon. Appoint .Net and When.com will also offer synchronization in the future.

To synchronize, you must first download each service's unique synchronization tool. The Visto Briefcase and Jump tools are based on Pumas IntelliSync technology. Yahoo Calendar's synchronization tool is based on Starfish Software's True Sync. All perform well and are very easy to use. In fact, it's amazing - and a little unsettling - to suddenly see your entire calendar and address book in a browser window. However, all of the online PIMs offer adequate security features, including **automatic** log-offs after a period of inactivity.

Each tool has its strengths. The IntelliSync-based tools offer more options for dealing with conflicts and can work with Outlook 97 and Outlook 98, Act, and Lotus Organizer. TrueSync for Yahoo can also synchronize with Outlook 97 or Outlook 98, and it was the only tool to sync with 3 Com's Palm handheld and Starfish Software's Rex device. Further, I liked the way TrueSync's log window displays the status of a synchronization. In Visto Briefcase's favor was its Instant Import Tool, a quick-and-dirty import utility. It works only with Outlook 97 and Outlook 98 and has few options, but it's simple and effective. And because it's a one-way tool, it sidesteps the confusion sometimes associated with synchronization.

Basically, you click a button, and everything in Outlook pours into Visto Briefcase.

As mentioned, any of these Webbased PIMs can be made public by sharing a log-in name and password. This isn't a perfect solution, however, because many online PIMs don't permit simultaneous log-ins from different IP addresses. Fortunately, Visto Briefcase, When .com, and Yahoo Calendar offer true public or shared calendars.

Visto Briefcase's public calendar is incorporated into its My Briefcase feature, where you can also post a welcome message and make files available. The public calendar is read-only, but it offers separate password protection and a nifty feature that lets you display only the blocks of time when you're busy, not the details of your appointments. You can also choose to make individual **events** public or private. The only trouble I had with My Briefcase was locating the proper URL to provide to my guests.

When.com's shared calendar isn't much different from its personal calendar. It employs a shared user name and password, something that's possible with all the online calendars. There are a few group-related touches, though, such as the Our Calendar label. Also, because all users have administrator rights (not that there's much to administer), anyone can change preferences and settings. When.com notifies all members of the group when a user makes a modification changing a password, for instance, triggers an e-mail-but any disgruntled group member can delete all other group members, thereby triggering no notifications. Truly, shared public calendars are no place for sensitive data or data you cannot reproduce easily.

I liked Yahoo Calendar's sharing features best. You can make your personal calendar public at an easy-to-remember URL (calendar.yahoo.com/public/username) or create a group calendar at Yahoo Clubs, which also includes bulletin board and chat modules. As with Visto's My Briefcase, you can define **events** as public or private in Yahoo Calendar and elect to show busy times with or without appointment details.

Things to come

The ties between Yahoo Calendar and Yahoo Clubs illustrate the direction in which Webbased applications such as online PIMs are heading. Calendars, address books, and todo lists are only a few of the services that portals such as AOL, Microsoft Network, and Yahoo want to provide. The more you can accomplish at one site (the "stickier" they are, in Web parlance), the more banner ads that site can serve.

(Illustration Omitted)

Captioned as: TRUESYNC FOR YAHOO CALENDAR is the only tool that can sync with Palm devices.

I didn't base my judgment of these online organizers on community or site-related features, but it was interesting to note how well they are engineered (with the exception of Visto Briefcase) to integrate **event** listings with your calendars. Yahoo Calendar probably has come the furthest in this regard. With a click, you can add celebrity chats, stock splits, and other **events** to your calendar, though TV listings and movie theater show times aren't linked yet. Appoint.Net offers a well-stocked **Event** Warehouse, and AnyDay.com's **Event** Club is coming soon. Microsoft's tentative acquisition of Jump and AOL's purchase of When.com are sure to improve the already respectable **event** listings of each service.

As portals pump up the links, sponsorships, and other commerce-related aspects of their sites, they should take care not to muck up the services that draw traffic in the first place. The banner ads that flash above most of these Web-based PIMs aren't too distracting, but they take up screen real estate and in some cases compromise a clear, usable design. It's a fine line, to be sure, but these online services won't be of any value if they look like stock cars covered with advertisements. For Web-based applications, the way they look is the way they work.

Sidebar:

## BOTTOM LINE

Web-based PIMs

## SUMMARY

Part of a new breed of networked applications accessed via a browser, free Web-based personal information managers (PIMs) are quickly becoming standard issue on portals such as Yahoo and Netcenter. The best offer a calendar, address book, and task list, as well as a way to synchronize that data with the PIM on your desktop computer.

## BUSINESS CASE

They aren't sophisticated enough to replace products such as Microsoft Outlook, but these online organizers can complement a desktop computer PIM for travelers who lack a laptop or handheld, and are well-suited to groups that need to share a calendar. Yahoo Calendar and Visto Briefcase are standouts, but any of the top six may suit your needs.

## PROS

Free

Accessible from any Internet-enabled workstation

Some synchronize with desktop PIMs

## CONS

Limited customization

Performance can be slow

Sometimes overly promotional and/or advertising-heavy

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## COMPANY NAMES:

America Online Inc

Yahoo

Jump Networks Inc

Visto Corp

GEOGRAPHIC NAMES: US

DESCRIPTORS: Personal information managers; World Wide Web; Product reviews

CLASSIFICATION CODES: 9190 (CN=United States); 5240 (CN=Software & systems)

; 9120 (CN=Product specific)

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Abstract: This paper presents MASMA, an interactive agent-based system able to assist users in managing their personal agendas. In MASMA different tasks are carried out by agents endowed with different capabilities. The paper mainly concerns the interface agents, here called Meeting Agents, that directly interact with users. In particular; capabilities are described that allow the agents to customize their behaviors according to user preferences and to participate to multiple meeting:negotiations following different contextual preferences. Issues are also shown that allow the users to maintain control over the delegated task. Examples of interactions are presented to support the particular solutions developed.

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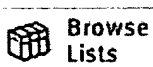
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## Powerful software, personal touch

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### Abstract:

*In the field of financial planning, a number of new technological advances have made the planner's job easier than ever before. Now, with the advancement of computer-aided planning and advanced Windows-based presentation programs, the level of sophistication in presentation outputs far exceeds anything previously available. Planners can now use graphs, line charts and more to represent client planning strategies and savings goals. But no matter how advance the presentation capabilities, they are nothing without an intelligent planner, adding "the personal touch."*

### Full Text:

*Copyright Institute of Certified Financial Planners Jun 1997*

No matter how good a piece of software is, no matter how many gadgets and gizmos it comes with, it is useless without a creative and intelligent person behind it. In the field of financial planning, a number of new technological advances have made the planner's job easier than ever before. Gone are the days of the 50-page outputs in plain black text-line after line of statistical analysis and savings projections.

Now, with the advancement of computer-aided planning and advanced Windows-based presentation programs, the level of sophistication in presentation outputs far exceeds anything previously available. Planners can now use graphs, colorful images and photographs, line charts and more to represent client planning strategies and savings goals. But no matter how advanced the presentation capabilities, they are nothing without an intelligent planner, adding "the personal touch."

What is the purpose of this software, and more importantly, the role of the planner? The simple goal is trust. The planner works with clients to develop a plan that meets their needs, addresses personal goals and issues and provides the client with a sense of security and direction. Some of these are tangible, like pages and charts. Others are intangible, like the feeling of security. This level of trust and teamwork between the client and the planner comes from many face-to-face meetings, phone calls and presentations over the years-the planner is building a portfolio of trust, just as the client is building his or her asset portfolio.

What does the planner provide that clients are unable to get on their own? Expertise. Whether it's knowledge about savings strategies, tax issues or insurance compliance, the planner is seen as an authority and guide on complex issues. Oftentimes, it is

impossible for any one planner to be an expert on all these issues-tax codes change frequently and insurance regulation is in a state of flux. To be at the forefront of information, planners rely on software programs to ensure they are up to date on all requirements and regulations. Although the software can be your information source, don't confuse that with being an "expert." You, as a planner, need to have the background and confidence to make the software work for you. Only if you are competent, will you display confidence. Its multiple nuances and functions need to be fully understood to enable you to use it to the full advantage for both you and your client.

### You May Need Training

All right, now you have decided to embrace some of this available technology. How do you acquire and learn it? Depending on your situation, such software can be licensed through a home office coordinator, through corporate sales, or directly from a software company.

Purchasing software is not enough. How many times have you bought software and never loaded it or loaded it and never really understood how to use it? When you purchase a program, take the time to read and familiarize yourself with the manual-develop an understanding of where the sections are on setup, troubleshooting, outputting, inputting information, and so forth. Some software even provides tutorials and inproduct "scripting." Once you have become familiar with the software, investigate opportunities for fully learning it. Does your office provide access to a trainer? Can you attend regional training sessions put on by the developer? Is there a local user group, or someone who can tutor you if necessary? Whatever your options are, I suggest you invest in some training. Why? By its nature, financial planning software will be comprehensive, with a multitude of calculations. Having access to a quick-start assist can reduce the otherwise lengthy learning process. On the flip side, nothing can make you look more unprepared than being unable to make the software perform based on client needs.

What else can hands-on planning with the software do for you? Many programs allow you to work with clients to pose and answer instant "what-if" questions. Is your client interested in seeing how altering monthly savings will affect taxes? Your expertise with the software will give you the ability to manipulate information as you go. In turn, you can further build trust with clients by giving them as many options as needed.

### Overcoming Obstacles

Embracing technology may seem daunting to you, so let's look at some obstacles you may perceive. First, some of you may be hesitant to invest the time to learn the software. Training sessions often can last an entire day or more. Second, some planners feel software programs are too difficult to learn-too many special features. Third, you may feel that even though software has progressed immensely over the years, it does not provide enough "sizzle" for the client.

How can these perceived obstacles be overcome? One of the best ways to see the ease of the software is to actually see it in action. If given the opportunity, watch another planner use the program or attend a demonstration. It should become obvious quickly if that software is relatively easy to use and it is only the content behind the software that is complicated. This is why the "personal touch" is so important.

In truth, most of the software available on the market is designed to make your job easier. Programs are designed to follow a natural flow of **events**, from fact-finding to calculation, to output and presentation. For example, a concept such as saving for a multiple-year future education need can be difficult to present in concise terms and figures to a client. However, the visual representations available in many programs give the **planner** necessary tools to explain concepts in a way the client can understand. In addition, many software tools allow you to customize the outputs to match a client's **personality**-more elaborate or simple, depending on what you think will best address your client's needs.

The topics addressed here lead us to a natural conclusion: What's next for planners? As software continues to advance and desktop computing capabilities move to new heights, the power of presentations and outputs also will be enhanced. New opportunities in higher-resolution images, animated presentations and high-quality photo images will make output pages look better than ever. Software also is becoming more flexible, with more options. You have the ability to do single-needs modules, comprehensive plans or a combination of both.

One of the greatest challenges facing this industry is the need for transparency. While planners may become familiar and comfortable with a particular software program, there comes a time when they want to export data into other programs to expand their capabilities to address additional database, asset management, policy administration issues and so forth. To date, there is no uniform standard for transferring data between programs. Some developers are working on developing a uniform standard for language, allowing flexibility and interrelation between applications.

Many companies also are looking at ways to increase the interaction between planners and clients. Some advances on the horizon include takehome CD-ROMs and the ability to access e-mail and the Internet for initiation, sending and updating client

information between planner and client, from a single Web server.

No matter how advanced the technology becomes, however, one issue will remain: there always will be a need for qualified and intelligent planners behind the software to make the process work. A computer cannot build a trusting relationship with your client-only you can.

**[Author note]**

Tom Hansch, CFP, is the president of Financial Profiles, Inc., a leading provider of needs-based analysis, calculation and presentation software for financial advisors.

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